

**ROUTING AND RECORD SHEET**

SUBJECT: (Optional)

Social Security Earnings Stmtns for Federal Employees Making FERS Decision

FROM

NO.

STAT

DATE

1 May 1987

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S  
INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. C/RD

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Please make contact with  
Social Security Administration  
and get a copy of the floppy  
disk for PIA Programs for FERS.

STAT



Refer to:

Baltimore MD 21235

APR 23 1987

To Federal Personnel Directors:

Re: Social Security Earnings Statements for Federal Employees  
Making FERS Decisions

On June 6, 1986, President Reagan signed into law an Act establishing the new Federal Employees Retirement System (FERS). The retirement legislation extends Civil Service employees two options:

1. Remaining in the current Civil Service Retirement System (CSRS), or
2. Participating in the new Federal Employees Retirement System.

FERS participants receive benefits both from the new Federal employee pension system and from Social Security. There are some employees who may have worked under Social Security in the past and will need to request information from their records so they can better understand the projected value of the Social Security benefit to their overall benefits. The Social Security Administration (SSA) and the Office of Personnel Management (OPM) have developed a process to furnish earnings statements and coverage information during the FERS Open Season (July 1 through December 31, 1987) to help the employee make a decision on a retirement system.

The SSA and OPM process involves the use of a contractor to produce forms which Federal employees can use to obtain statements from their Social Security records. Shortly, SSA will provide a supply of forms to each Federal Agency for distribution to employees together with a return envelope so employees can request their earnings history. Each agency has the option of distributing the forms to all their FERS-eligible employees or advising their employees of the availability of the forms and distributing them on an "on-request" basis only. In order to keep the workload down and provide better service to employees who really need their Social Security earnings to make their FERS decision, the latter option is preferred.

Those employees who believe that they need their Social Security record for the FERS decision should promptly complete and return the form. A copy of the form is attached which includes name, Social Security number, date of birth, sex, current address and signature. Upon receipt of the form the input data will produce a statement from the system which shows coverage information and year-by-year earnings amounts. Statements should be mailed to employees 3 to 5 weeks after submission.

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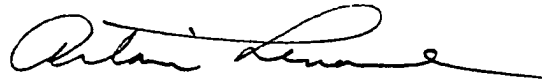
In addition, SSA's Office of the Actuary has developed a personal computer program that can estimate a person's Social Security benefit based on his or her lifetime annual earnings under Social Security. If your agency would like a copy of the floppy disk containing this program, send a standard IBM-compatible PC disk (5 1/4" double-side, double density) or an IBM-compatible PC/AT disk (5 1/4" double-side, high density) to the following address:

"PIA Program for FERS"  
Office of the Actuary  
Social Security Administration  
4-N-29 Link  
6401 Security Boulevard  
Baltimore, Maryland 21235

We will copy the program onto your disk and return it to your office with a brief instructional handbook. Please send only one request per agency. However, we encourage your agency to make as many copies as you wish from the copy you obtain from SSA. (The program is not copyrighted.)

If you are planning to prepare a covering memorandum to your employees about the Social Security form we are recommending the attached draft language.

Sincerely,



Antonia Lenane  
Director  
SSA FERS Task Force

Enclosures

Declassified in Part - Sanitized Copy Approved for Release 2012/07/02 : CIA-RDP89-00066R000800090005-3

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F. STATE/ COUNTRY CODE	
0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9

**ZIP CODE**

0	1	2	3	4
5	6	7	8	9

TERRITORY  
CODES

AK	01	Baker Island	52
AK	02	Canton Island	53
AZ	03	Caroline Island	54
AR	04	Endebury Island	55
CA	05	Guam	56
CO	06	Howland Island	57
CT	07	Jarvis Island	58
DE	08	Johnston Island	59
DC	09	Kingman Reef	60
FL	10	Manua Island	61
GA	11	Marshall Islands	62
HI	12	Midway Islands	63
ID	13	Navassa Island	64
IL	14	Northern Mariana Islands	65
IN	15	Islands	
IA	16	Palau	
KY	17	Puerto Rico	66
KS	18	Saint Croix Island	67
LA	19	Saint John Island	69
ME	20	Saint Thomas Island	70
MD	21	Samoa (American)	71
MA	22	Sand Island	72
MI	23	Swain's Island	73
MN	24	Trust Territory of	74
MS	25	the Pacific	
MO	26	Virgin Islands (U.S.)	75
MT	27	Wake Island	76

**COUNTRY  
CODES**

NM	30	Bahamas	77
NH	31	Barbados	78
NI	32	Bermuda	79
NY	33	Canada	80
NC	34	Alberia	79
ND	35	British Columbia	81
OH	36	Manitoba	82
OK	37	OK	81
OR	38	Northwest Terr.	83
PA	39	Ontario	84
RI	40	Quebec	85
SC	41	Yukon	86
SD	42	Colombia	87
SI	43	Costa Rica	88
TN	44	Dominican Republic	89
TX	45	El Salvador	90
UT	46	Guatemala	91
VJ	47	Haiti	92
VA	48	Honduras	93
WV	49	Jamaica	94
WI	50	Mexico	95
WY	51	Nicaragua	96
		Panama	97
		Venezuela	98
		Other (Specify Below)	99

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<b>U</b>	<b>PENALTY CLAUSE</b> I am the individual to whom the record pertains. I understand that if I knowingly and willingly request or receive a record about an individual under false pretenses I would be guilty of a Federal crime and could be fined up to \$5,000. I authorize you to send the statement of my earnings to me through a processing contractor.
	Print Name _____  Signature _____  Date _____ NOTE: This form <b>MUST BE SIGNED</b> and dated within 60 days prior to receipt by Social Security Administration for it to be processed.

President Reagan recently signed into law an Act providing the new Federal Employees Retirement System (FERS). The retirement legislation extends to Civil Service employees two options:

1. Remaining in the current Civil Service Retirement System (CSRS), or
2. Participating in the new Federal Employees Retirement System.

FERS participants receive benefits both from the new Federal employee pension system and from Social Security. Many of you may have worked under Social Security in the past and may have a need to request information from your records so you can better understand the projected value of the Social Security benefit to the overall benefits. The Social Security Administration (SSA) and the Office of Personnel Management (OPM) have developed a process to furnish earnings statements and coverage information during the FERS Open Season (July 1 through December 31, 1987) to help you make a decision on a retirement system.

AGENCY: CHOOSE ONE ALTERNATIVE

The attached form can be used to get your earnings information from SSA. (DO NOT USE STAPLES ON THE FORM.)

OR

If you desire to get your earnings from SSA please (AGENCY SHOULD CUSTOMIZE).

Promptly complete and return the form, which includes name, Social Security number, date of birth, sex, current address and signature. SSA will produce a statement from the system which shows coverage information and year-by-year earnings amounts. You should receive a statement 3 to 5 weeks after submission.

To help keep the workload manageable, please request records only if needed. If you have never worked under Social Security or you have already made the decision, do not send in the request form. Also, if you were covered under FERS before January 1984 you will not need to submit a form.

You are encouraged to use the Social Security earnings information together with a FERS Transfer Handbook, which will be provided by OPM, to determine how FERS coverage would apply to you personally.